Chapter 7:   Threading Logbook Entries

A thread is a vehicle to link a series of entries relating to a particular issue. In this chapter, we discuss creating and manipulating *threads*.
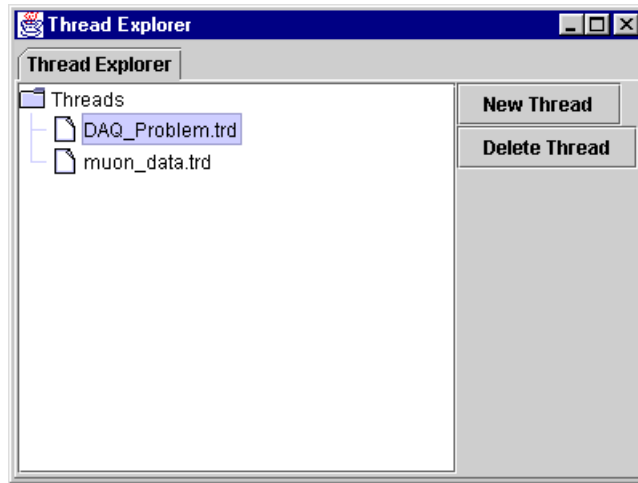
7.1 About Threads

A thread links entries relating to a particular issue. It provides easy access to the flow of information on an issue, given that the entries may have been entered in different desktop pages, categories and/or topics, and by different operators. Only archived entries can be threaded. Entries can be linked to multiple threads. The thread itself is nothing more than an XML file that contains pointers to all the archived entries that have been linked to it. The thread name is used as the XML file name. Threads are designed to create temporary links, they are not maintained in the database. A thread can, but does not have to be removed after the issue it chronicles gets resolved.
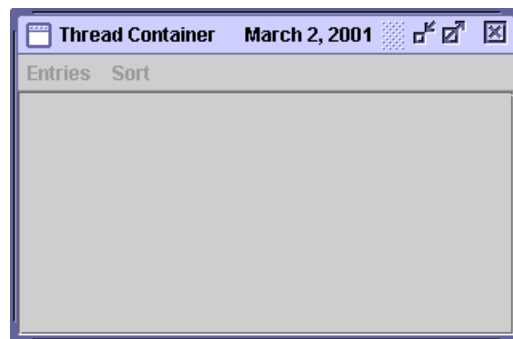
7.1.1 The Thread Explorer

The **THREAD EXPLORER** button on the **CRL** toolbar brings up the **THREAD EXPLORER** window. This window displays the contents of the threads directory, which is the list of thread files. The directory name varies by installation. The image below shows the directory name as `Threads`, and it contains two threads. From this window you can:

> • create a new thread
>
> • delete an existing thread
>
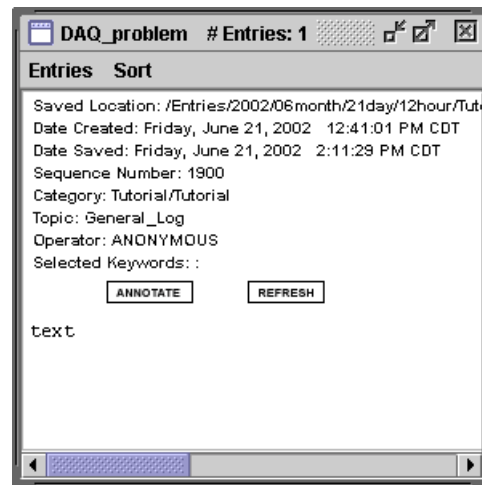> • drop the contents of a thread into a thread container

7.1.2 Thread Containers

A thread container provides a window for viewing and manipulating a thread. If configured, you will find a menu option on one or more of your data input desktop pages for threads (typically labelled **THREADS**). This menu item is used to pop up a thread container. Initially, the window is labelled **THREAD CONTAINER**.

Once a thread is dropped into it, its label changes to the thread name, the number of entries is displayed, and the threaded entries appear in the container. In a thread container, entries can be:

- viewed
- selected and unselected
- printed
- sent via email to a recipient
- added to a different thread
- deleted from a thread
- annotated

as shown in the **ENTRIES** menu:

Via the **SORT** menu (not shown), the entries can be sorted by "date added to thread" (the default) or by "date created".

You can drop only one thread into a thread container.
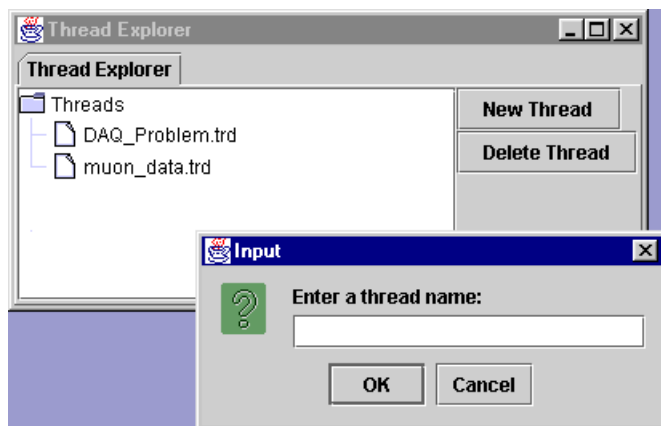
7.2 Creating a Thread

You can create a thread from the **THREAD EXPLORER**, from an entry input container, or from a thread container.

☞ When creating a thread, choose a thread name consistent with the filename constraints of the operating system in use; the XML file containing the thread will be named `<threadname>.trd`.
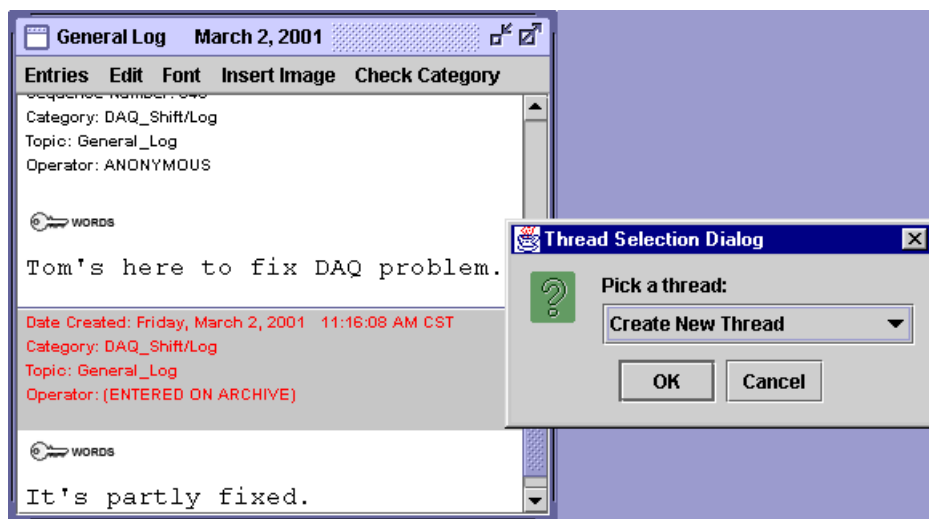
7.2.1 From the Thread Explorer

Click the **THREAD EXPLORER** button on the **CRL** toolbar to bring up the **THREAD EXPLORER** window. On the **THREAD EXPLORER** window, click **NEW THREAD**. You will be prompted for a thread name. Enter a name, and press **OK**.
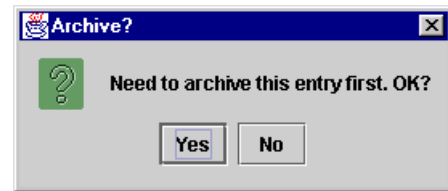

7.2.2 From an Entry Input Container

First bring up an input container from the desktop page menu. On this container, select one or more entries that you want to include in a new thread. (Selecting entries is discussed in section 4.2 *Selecting Logbook Data*.) From the **ENTRIES** menu, click **ADD SELECTED ENTRIES TO A THREAD**. The system will prompt you for a thread name. Select **CREATE NEW THREAD** and type in a new name to create the thread.
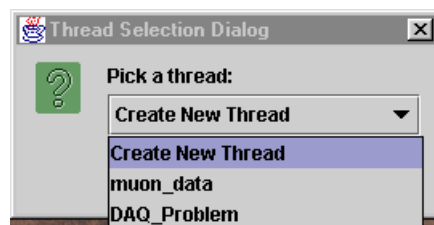
For any entries that are not yet archived, the system will prompt you to archive each one first.

If you respond **YES**, **CRL** will archive the entry and add it to the selected thread. If you respond **NO**, neither action will take place.

7.2.3 From a Thread Container

Bring up a thread container from the desktop page menu and also click the **THREAD EXPLORER** button on the **CRL** toolbar to bring up the **THREAD EXPLORER** window. Drag and drop a thread into the thread container. In the container, select one or more entries that you want to add to a new thread. (Note that all these entries are already linked to a thread; here you're selecting some to link to a second, new thread.) (Selecting entries is discussed in section 4.2 *Selecting Logbook Data*.) From the **ENTRIES** menu, click **ADD SELECTED ENTRIES TO A THREAD**. The system will prompt you for a thread name. Select **CREATE NEW THREAD** and type in a new name to create the thread.
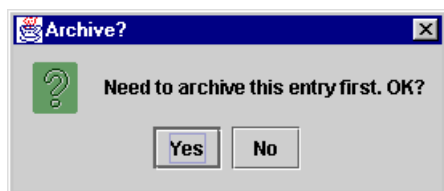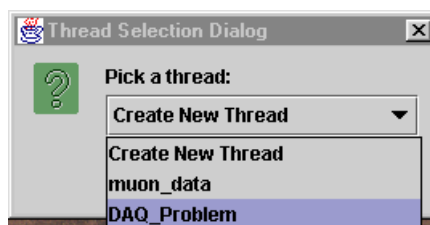

7.3 Adding Entries to a Thread

You can add entries to a thread from an entry input container or from a thread container.

7.3.1 From an Entry Input Container

On an input container, select one or more entries that you want to include in a thread. (Selecting entries is discussed in section 4.2 *Selecting Logbook Data*.) From the **ENTRIES** menu, click **ADD SELECTED ENTRIES TO A THREAD**.

The system will prompt you for a thread name. You can choose an existing thread name, or type in a new one.
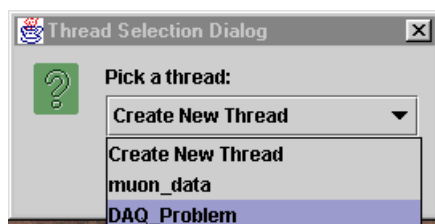

For any entries that are not yet archived, the system will prompt you to archive each one first.

If you respond **YES**, **CRL** will archive the entry and add it to the selected thread. If you respond **NO**, neither action will take place.

7.3.2 From a Thread Container

Bring up a thread container from the desktop page menu. From this container, select one or more entries that you want to add to a (different) thread. (Selecting entries is discussed in section 4.2 *Selecting Logbook Data*.) From the **ENTRIES** menu, click **ADD SELECTED ENTRIES TO A THREAD**. The **THREAD SELECTION DIALOG** box pops up. You can choose an existing thread name, or type in a new one.

7.4 Viewing and Manipulating a Thread

The entries linked to a thread can be collected and manipulated in a thread container. To work with threads, first click the **THREAD EXPLORER** button on the **CRL** toolbar to bring up the **THREAD EXPLORER** window. Also bring up a thread container from the desktop page menu.
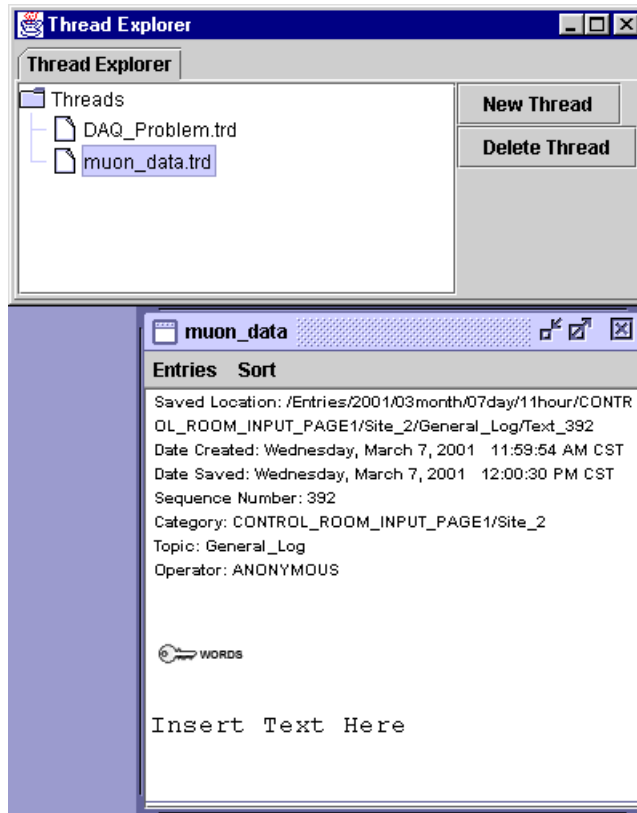
From a thread container you can view and sort entries, print them, send them via email, add them to a different thread, and/or delete them from the thread.

To see the menu options, click the **ENTRIES** menu (or right-click). The sorting options are under the **SORT** menu.

7.4.1 View and Sort Entries in a Thread

On the **THREAD EXPLORER**, select the thread you want to view, and drag it into a thread container. All the entries linked to the thread appear in the container. The default sorting is by date added to thread, in reverse-date order. You can change the sorting to sort by entry creation date, again in reverse-date order. In the image below, we show the **THREAD EXPLORER** window above the thread container. Notice that the thread container is labelled with the name of the thread that's displayed.

7.4.2 Print Entries in a Thread

There are two menu options for printing a report from a thread container: **PRINT SELECTED ENTRIES** and **PRINT ALL ENTRIES IN THIS THREAD**. When you click one of these options, a standard **PRINT** window pops up in which you set the destination printer and printer options. The printed report will contain entries in the container, according to your selection.

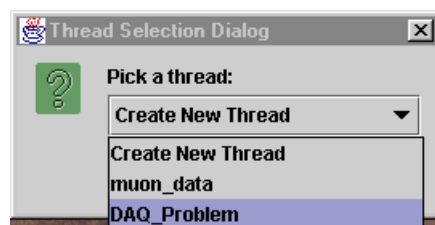## 7.4.3 Send Entries to an Email Recipient

There are two menu options for sending logbook entries: **SEND SELECTED ENTRIES TO MAIL RECIPIENT** and **SEND ALL ENTRIES TO MAIL RECIPIENT**. These work similarly to the **SEND** options for input container menus, described in section 4.7 *Sending Entries via Email*, except that the shortcut keys are not implemented for thread containers.

7.4.4 Add Entries from One Thread to Another

To add a single entry or a set of hand-picked entries to a different thread, first select the entries you want in the thread container, as described in section 4.2.1 *Select/Deselect Single or Multiple Entries*.

Then choose **ADD SELECTED ENTRIES TO THREAD** from the **ENTRIES** menu.

The **THREAD SELECTION DIALOG** box pops up. You can choose an existing thread name, or type in a new one.

7.4.5 Delete Entries from a Thread

You can delete a single entry or a set of hand-picked entries from a thread. In the thread container, first select the entries that you want to delete, as described in section 4.2.1 *Select/Deselect Single or Multiple Entries*. Then choose **DELETE SELECTED ENTRIES FROM THREAD** from the **ENTRIES** menu. **CRL** prompts for confirmation before deleting.

To delete all entries from the thread, simply choose **DELETE ALL ENTRIES FROM THREAD** from the **ENTRIES** menu.

7.5 Deleting a Thread

Click the **THREAD EXPLORER** button on the **CRL** toolbar to bring up the **THREAD EXPLORER** window. Select the thread you want to delete. On the **THREAD EXPLORER** window, click **DELETE THREAD**. A confirmation prompt is provided. This deletes the XML thread file only; the entries that were in the thread remain archived.